



Declaration of Future Intent

Thank you for your intention to include Oak Hills Memorial Foundation in your estate plan. Please complete this form with as much detail as you are willing to share. Information about your gift will remain confidential and does not create a binding obligation.

New Intention Updated Intention

MY INFORMATION

Name _____ Spouse Name (if joint gift) _____

Address _____

Phone _____ Email Address _____

GIFT INFORMATION

I have provided a gift to Oak Hills Memorial Foundation as set forth in my:

- Will or Trust Life Insurance Policy Charitable Gift Annuity Charitable Remainder Unitrust
- Retirement Plan or Beneficiary Designation (401(k), 403(b), IRA, Keogh, Brokerage Account)
- Other Asset(s) _____
- Oak Hills Memorial Foundation is a contingent beneficiary of the indicated asset above. Please explain below:

Please indicate one of the following options and complete the applicable information:

- My gift has a set value of \$_____.
 - My gift is _____% of my estate, with a conservative estimated value* of \$_____.
- *Oak Hills Memorial Foundation understands that the size of my estate and future gift may change.

GIFT PURPOSE

My bequest or planned gift is designated for:

In Honor or Memory Of: _____

My bequest or planned gift is to be used for:

- Leave a Legacy Endowment Unrestricted
- Other (Please note which area(s) you wish to benefit and provide percentages or specific amounts for multiple areas.)

RECOGNITION

Donors of a planned gift to Oak Hills Memorial Foundation will be recognized in our annual report as well as various other ways throughout the year.

Please list my name(s) as follows:

I prefer no public recognition

I understand this form does not create a binding obligation and any details about my gift will remain confidential.

Signature:

Spouse's Signature:

Date _____

Date _____

Please sign and return this form to: Oak Hills Memorial Foundation
By Mail: 1314 8th Street North New Ulm, MN 56073
By Phone: (507) 233-0851 • By Email: wendylang@oakhillsnewulm.com